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**From:** Matt Dunn <Matt\_Dunn@mckinsey.com>  
**Sent:** Friday, January 4, 2019 10:02 AM  
**To:** Dykes, Melissa H. - President/COO; Hiers, Angelia R. - VP & Chief Human Resources Officer; Goldberg, David M. - Director Customer & Community Engagement; Wannemacher, Ryan F. - Chief Financial Officer; Anton Derkach; Williams, Clint J. - Manager Technical Services  
**Cc:** Sarah Brody  
**Subject:** RE: Teleconference call with McKinsey

[External Email - Exercise caution. DO NOT open attachments or click links from unknown senders or unexpected email.]

Hello all! Looking forward to speaking in a moment. Attached is a first pass as an OHI kick-off document we can use for our conversation. Looking forward to speaking in a moment!

-----  
Matt Dunn  
McKinsey & Company | Cell: +1 202 644 1010

-----Original Appointment-----

**From:** Dykes, Melissa H. - President/COO <dykemh@jea.com>  
**Sent:** Thursday, January 3, 2019 2:23 PM  
**To:** Dykes, Melissa H. - President/COO; Hiers, Angelia R. - VP & Chief Human Resources Officer; Goldberg, David M. - Director Customer & Community Engagement; Wannemacher, Ryan F. - Chief Financial Officer; Anton Derkach; Matt Dunn; Williams, Clint J. - Manager Technical Services  
**Subject:** [EXT]Teleconference call with McKinsey  
**When:** Friday, January 4, 2019 10:00 AM-11:00 AM (UTC-05:00) Eastern Time (US & Canada).  
**Where:** INTERNAL - Melissa Dykes office - T16 EXTERNAL: Teleconference line number: 1-866-907-1051 /Melissa Dykes Passcode: 541779132 /All Others Passcode: 9202205

Setting up 1-hour teleconference call with JEA and McKinsey – La'Trece Bartley 1/3/19

Internal - will meet in Aaron Zahn's office – T16

External - Teleconference line number: 1-866-907-1051 /Melissa Dykes Passcode: 541779132 /All Others Passcode: 9202205

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Florida has a very broad Public Records Law. Virtually all written communications to or from State and Local Officials and employees are public records available to the public and media upon request. Any email sent to or from JEA's system may be considered a public record and subject to disclosure under Florida's Public Records Laws. Any information deemed confidential and exempt from Florida's Public Records Laws should be clearly marked. Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public-records request, do not send electronic mail to this entity. Instead, contact JEA by phone or in writing.

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copy it, disclose its contents or use it for any purpose.

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# Organizational Health Index: JEA's OHI kickoff document

DISCUSSION DOCUMENT

# Objectives



- **Get familiar with the team**

- Provide an overview of org health
- Align on path to launch the OHI survey
- Share helpful resources with you

# Introductions – McKinsey & JEA working teams

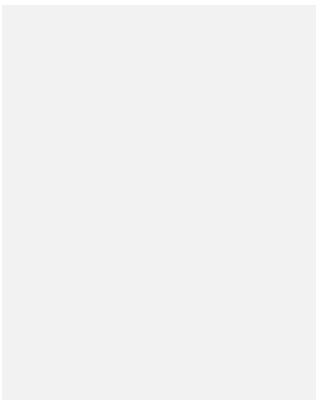
## McKinsey Project Overall



**Sarah Brody**

Engagement  
Manager

Washington, DC  
(onsite)



**TBD**

Associate  
TBD (onsite)

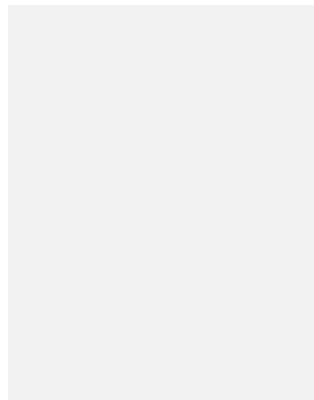
## OHI & Health Journey



**Matt Dunn**

Org Expert & OHI  
Manager

Washington, DC  
(remote)



**TBD**

OHI Coach  
TBD (remote)

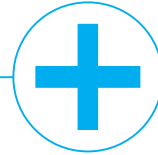
# Objectives



- Get familiar with the team
- **Provide an overview of org health**
- Align on path to launch the OHI survey
- Share helpful resources with you

The big idea: leaders need to measure and manage organizational health with the same rigor as performance

## PERFORMANCE



## HEALTH

What an enterprise does to improve how it **buys** raw materials, **makes** them into products, and **sells** them into the market to drive financial and operational results

**Deliver Results**

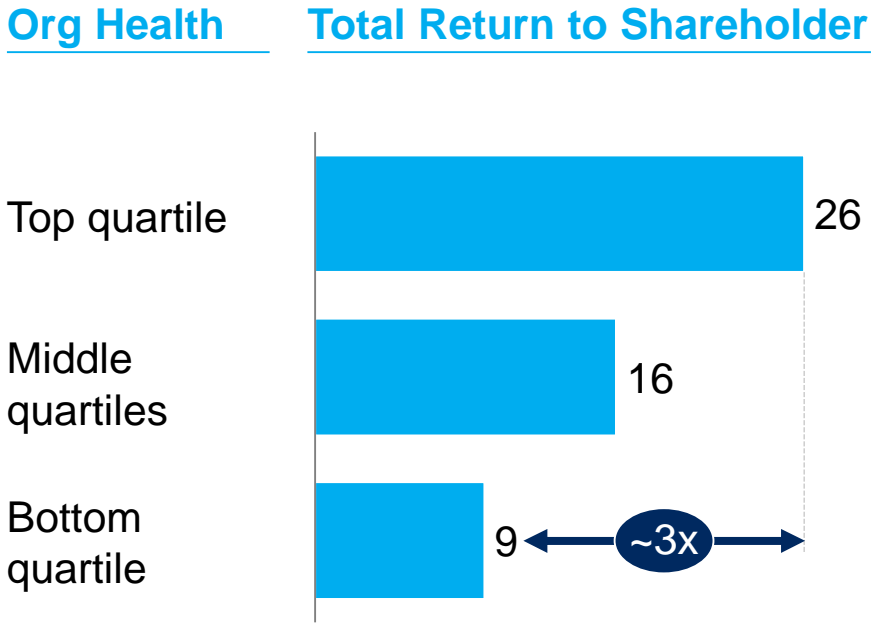
How an organization **aligns** itself, **executes** with excellence, and **renews** itself to sustainably achieve performance aspirations

**Run the Place**



# Focusing on Organizational Health is one of the best ways to sustainably deliver impact over time

**Macro Level:**  
Results across organizations

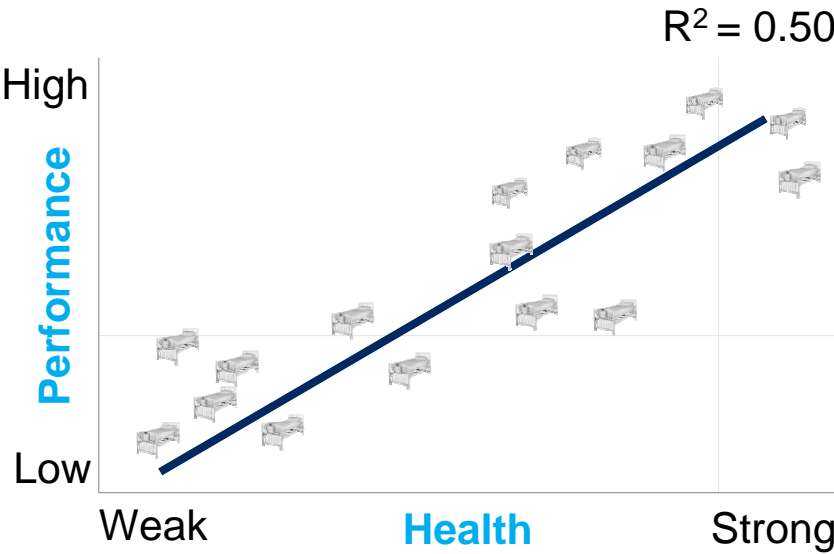


**Healthy organizations achieve ~3X average TRS for stakeholders<sup>1</sup>**

<sup>1</sup> Total Return to Shareholder averaged across 9 years of McKinsey's database  
<sup>2</sup> Example based on a healthcare network, each bed icon representing a different facility/location

**Micro Level:**  
Results within an organization

**OHI score correlation to individual unit performance**



**OHI scores explain >50% of variance in performance<sup>2</sup>**



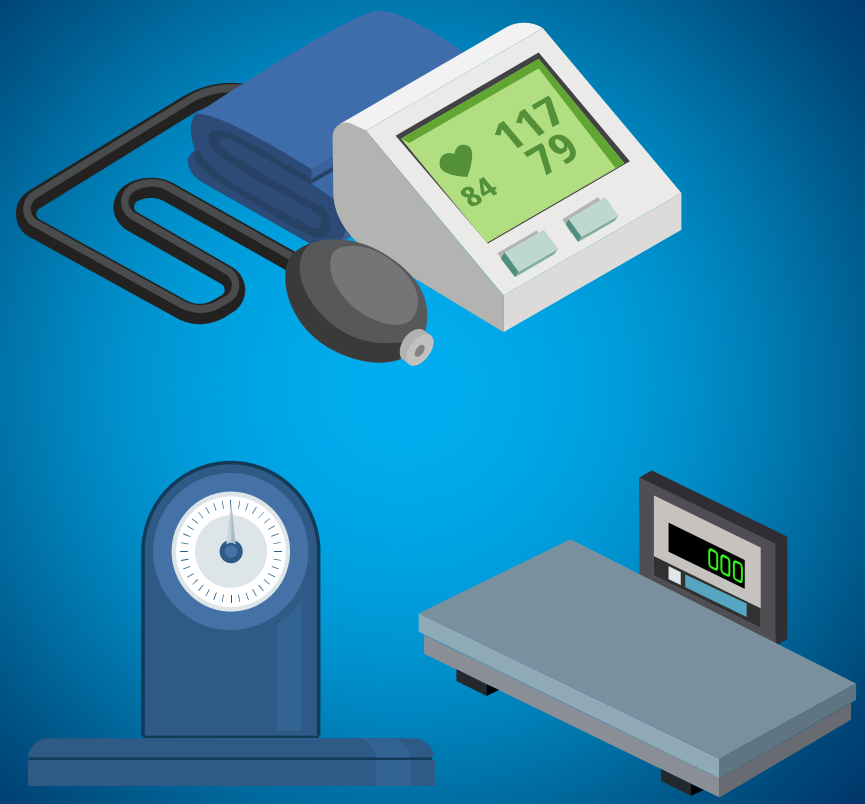
# The OHI measures Health on two dimensions independently – Outcomes and Practices

What you do



Management Practices

What you get



Outcomes

# The 9 outcomes measure how effectively an organization can Align, Execute, and Renew itself

Measures what's working & not working



## Align

Are people aligned around the organization's vision, strategy, culture and values?

## Execute

Can employees deliver on their roles with the current capabilities, processes and motivation level?

## Renew

How does the organization understand, interact, respond, learn from and adapt to its situation and external environment?

# The 37 Practices are “what you do” – the behaviors that drive each outcome

Measures frequency, from “often” to “rarely”

## Direction

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- 1. Shared Vision
- 2. Strategic Clarity
- 3. Employee Involvement

## Accountability

---

- 12. Role Clarity
- 13. Performance Contracts
- 14. Consequence Management
- 15. Personal Ownership

## Motivation

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- 25. Meaningful Values
- 26. Inspirational Leaders
- 27. Career Opportunities
- 28. Financial Incentives
- 29. Rewards & Recognition

## Leadership

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- 4. Authoritative Leadership
- 5. Consultative Leadership
- 6. Supportive Leadership
- 7. Challenging Leadership

## Coordination & Control

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- 16. People Performance Review
- 17. Operational Management
- 18. Financial Management
- 19. Professional Standards
- 20. Risk Management

## Innovation & Learning

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- 30. Top-Down Innovation
- 31. Bottom-Up Innovation
- 32. Knowledge Sharing
- 33. Capturing External Ideas

## Work Environment

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- 8. Open & Trusting
- 9. Internally Competitive
- 10. Operationally Disciplined
- 11. Creative & Entrepreneurial

## Capabilities

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- 21. Talent Acquisition
- 22. Talent Development
- 23. Process Based Capabilities
- 24. Outsourced Expertise

## External Orientation

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- 34. Customer Focus
- 35. Competitive Insights
- 36. Business Partnerships
- 37. Gov’t & Community Relations

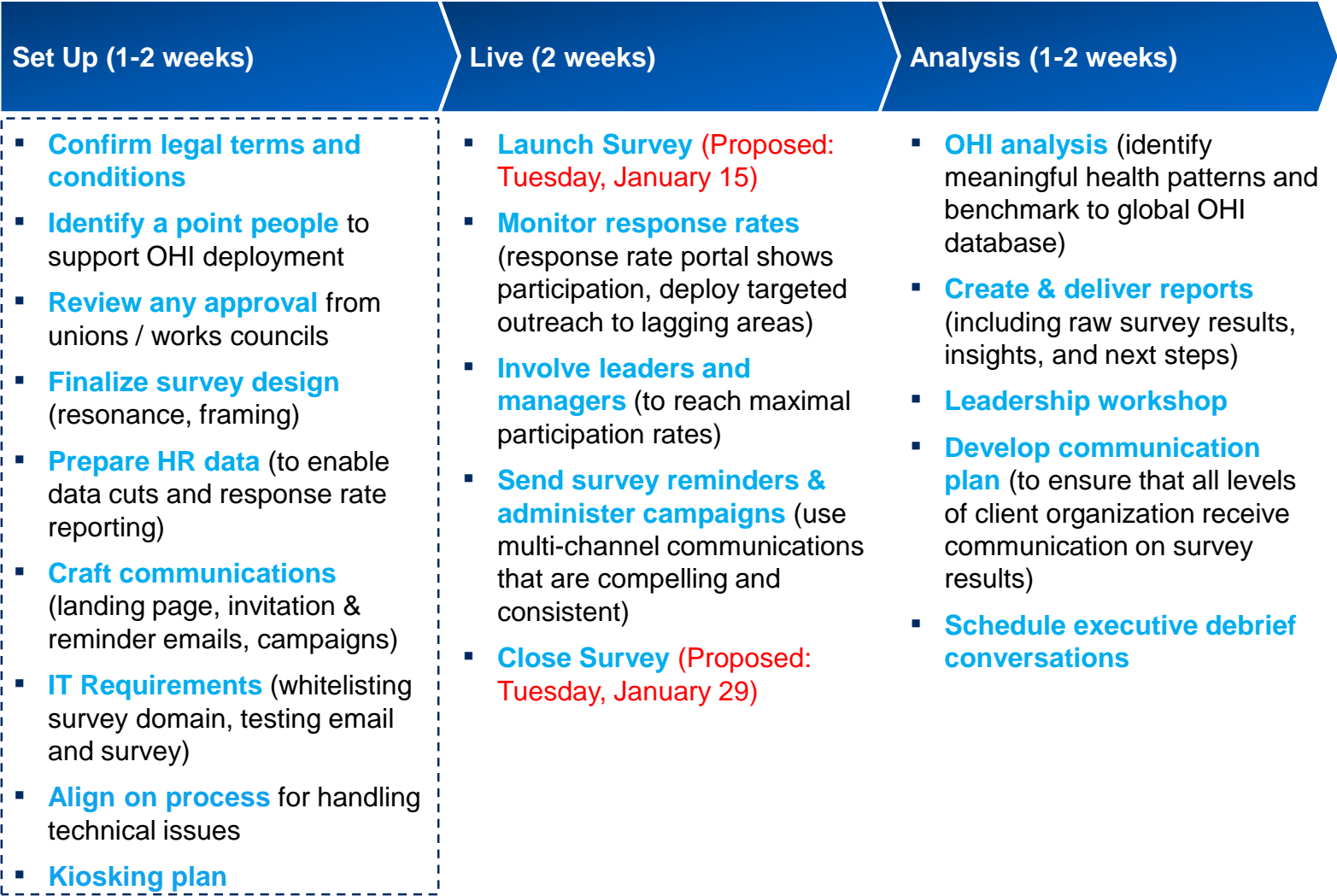
# Objectives




- Get familiar with the team
- Provide an overview of org health
- **Align on path to launch the OHI survey**
- Share helpful resources with you

# Administering the OHI survey: Major activities

  Focus of today



# OHI deployment: What we need from you

 Time intensive

	Requirement	By when	Owner
Survey logistics	▪ <a href="#">Project sponsor to sign online terms &amp; conditions</a>	...	...
	▪ Point person to work directly with OHI team	...	...
	▪ <a href="#">Approval (if necessary) from unions / works councils</a>	...	...
Survey design	▪ Languages required for launch	...	...
	▪ <a href="#">Text edit tool to edit 'customizable' parts</a>	...	...
	▪ <a href="#">HR data file with demographics questions choices (and TBD: email addresses)</a>	...	...
	▪ <a href="#">Additional survey modules (optional)</a>	...	...
Comm-unications	▪ <a href="#">Communications language (pre-note, invitation, &amp; reminder)</a>	...	...
	▪ <a href="#">Execution of communication plan</a>	On-going	...
Testing and launch	▪ <a href="#">Confirmation of completed whitelisting in all sites / locations</a>	...	...
	▪ Helpdesk email address (from client) and process to handle technical issues	...	...

Once all requirements are complete, the survey will undergo a 24-hour freeze for quality review before launching

# Objectives



- Get familiar with the team
- Provide an overview of org health
- Align on path to launch the OHI survey
- **Share helpful resources with you**



- **Survey logistics**

- Survey design
- Communications
- Testing & launch
- Deployment (kiosks)

# Tips to help get timely union/works council approvals

## Engage Early

- **Bringing union leaders on board early** to provide comfort with the objectives, outputs, and survey language
- Unions have been helpful **flagging potential wording challenges** and helping devise a communication/roll-out plan that **maximizes participation**

## Emphasize Confidentiality

- Emphasizing that **survey responses are treated confidentially** and that all results are only shared in aggregate to avoid individual identification so they cannot be used adversely against individuals
- It is helpful to walk through an example report to **illustrate the level at which results are shared**

## Articulate Benefits to Employees

- Walking union members through case studies that illustrate how **results can be used to improve the working environment** can demonstrate alignment of interests
- Sharing examples so that unions get **good ideas for potential interventions** that can be used in the action planning workshops

## Share Results and create Transparency

- Being clear about how you will **be transparent with the survey results** assists in building openness and trust throughout your focus on organizational health
- **Using results to create action plans** to make positive change, while leveraging and engaging the unions throughout the action planning process to assist with the changes and ensure support/impact

- **Keep in mind obtaining approvals can extend the timeline**
- **Note that while we can share our experience, we cannot provide legal advice**

# Helpful resources

- Survey logistics
- **Survey design**
  - Using the text edit tool
  - Demographics
  - Additional survey modules
- Communications
- Testing & launch
- Deployment (kiosks)

# Helpful resources

- Survey logistics
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# Text edit tool to customize survey: Log in and choose language (1/4)

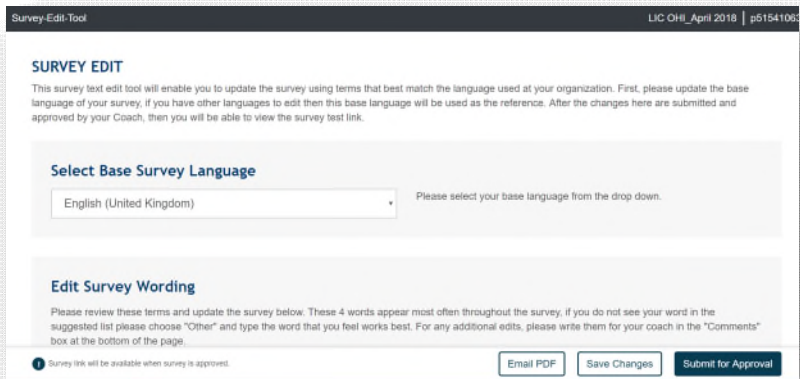
The text edit tool enables you to make changes to very specific areas of your survey and visualize what those changes will actually look like. Once complete, your OrgSolutions Coach will be able to review all suggested changes before they become final.

## 1 Log in to the tool using the link provided by your coach

URL:

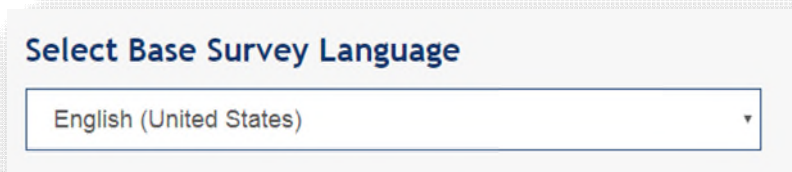
Username:

Password:



The screenshot shows the 'Survey-Edit-Tool' interface. At the top, it says 'SURVEY EDIT'. Below that, a paragraph explains the tool's purpose: 'This survey text edit tool will enable you to update the survey using terms that best match the language used at your organization. First, please update the base language of your survey. If you have other languages to edit then this base language will be used as the reference. After the changes here are submitted and approved by your Coach, then you will be able to view the survey test link.' Below this text is a section titled 'Select Base Survey Language' which contains a dropdown menu currently showing 'English (United Kingdom)'. To the right of the dropdown is the text 'Please select your base language from the drop down.' Below this is another section titled 'Edit Survey Wording' with a paragraph of instructions: 'Please review these terms and update the survey below. These 4 words appear most often throughout the survey, if you do not see your word in the suggested list please choose "Other" and type the word that you feel works best. For any additional edits, please write them for your coach in the "Comments" box at the bottom of the page.' At the bottom of the form are three buttons: 'Email PDF', 'Save Changes', and 'Submit for Approval'. A small note at the bottom left states: 'Survey link will be available when survey is approved.'

## 2 Select your base language from the drop down menu



This is a close-up of the 'Select Base Survey Language' dropdown menu. The dropdown is open, showing 'English (United States)' as the selected option. The dropdown arrow is visible on the right side of the menu.

# Text edit tool to customize survey: Tailor questions (2/4)

- 3 Using the Text Editing Tool, you may tailor the language of four specific words/phrases and the survey landing page to match your culture and context.

**Edit Four Specific Words / Phrases:** “the Company”; “employee”; “manager”; and “boss”

- In the “Review Survey Terms” section, select the terms most appropriate for your organization from the provided dropdown menus; click “Apply” when complete
- In the “Review Survey” section, check how your selections show in the survey questions by expanding each Outcome or Practice section (except the “Email Text” section)

**Review Survey Terms**

Please review these terms and update the survey below. These 4 words appear most often throughout the survey, if you do not see your word in the suggested list please choose “Other” and type the word that you feel works best. For any additional edits, please write them for your coach in the “Comments” box at the bottom of the page.

1 the company (default) 2 manager (default) 3 boss (default) 4 employee (default)

5 Apply Undo

**Review Survey**

Below is the list of questions in your OHI survey. The default terms (as shown above) are highlighted in blue and all edited terms will be highlighted in yellow. The sections are broken up in to Outcomes and Practices, respectively.

**Coordination & Control**

**Outcome**

1. The company effectively measures the performance of core business
2. Reviews of business performance lead to corrective, follow-up action
3. The company is able to minimize unexpected performance results

**Practice**

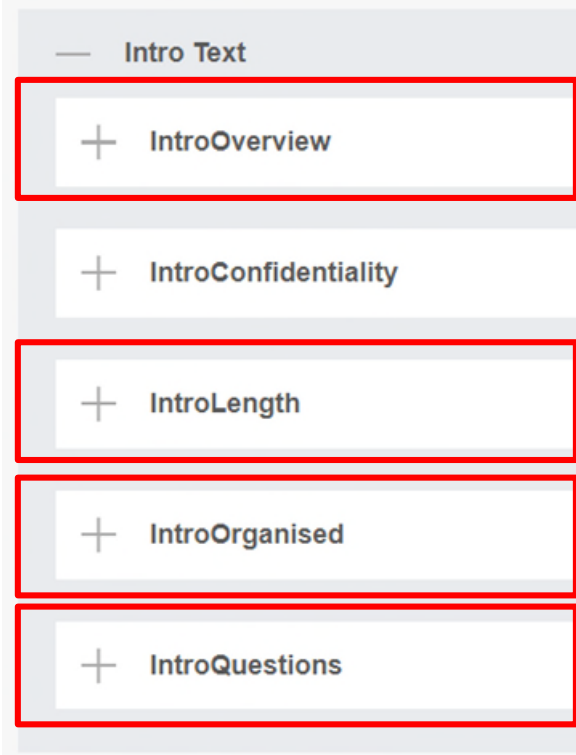
1. Leaders in the company (including my boss) guide their business de
2. The company systematically tracks employees’ performance over ti
3. The company’s performance feedback and review processes collect potential
4. The company has clear operating goals and metrics at all levels
5. Each unit of the company has explicit targets for its operating perfor
6. The company has clear oversight and control of its finances at all le
7. The company’s financial measures are good indicators of its true ec
8. The company uses formal policies to discourage employees from er
9. The company is able to identify potential performance issues and th
10. The company encourages employees to identify risk issues and esc
11. Supervisors are able to work quickly when faced with difficult proble
12. The company uses standard operating procedures to influence the v

# Text edit tool to customize survey: Edit the survey overview page (3/4)

## 4 Edit Survey Landing Page

In the “Review Survey” section, edit the survey introduction language (except the IntroConfidentiality section) as appropriate for your organization

It is important that the IntroConfidentiality language is NOT edited.

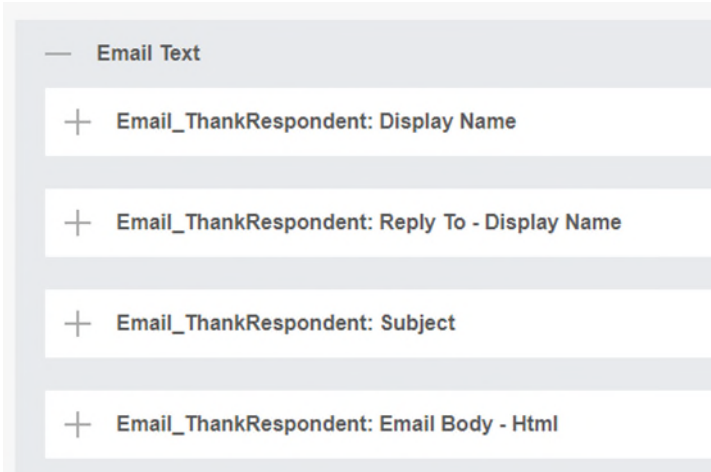


## 5 Edit Survey Email Text

In the “Review Survey” section, edit the survey email language as appropriate for your organization

There are 3 types of email: Welcome, Reminder, and Thank You. Each email has several sections to update:

- **Display Name:** Name to be displayed in the “From” field in an email
- **Subject:** Subject line of the email
- **Body:** Fully editable email body

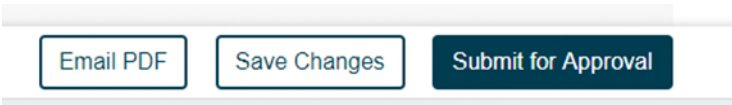




# Text edit tool to customize survey: Finalize edits (4/4)

## 6 Finish Editing

- Click “Save Changes” to continue at another time
- When changes are complete, click “Submit for Approval”. The OrgSolutions team will then login to approve your suggested edits



- Once the coach approves you will get a link back to the tool to either view your text survey or edit another language based off of the completed base

## 7 Edit Another Language

- Click on the “Compare Language” section
- For reference, on the left side will be the base language that is already approved and on the right side will be the language to edit.

### SURVEY EDIT

This survey text edit tool will enable you to update the survey using terms that best match the language used at your organization. First, please update the base language of your survey. If you have other languages to edit then this base language will be used as the reference. After the changes here are submitted and approved by your Coach, then you will be able to view the survey test link.

#### Survey Link Now Ready

Your survey edits submitted to the Coach has now been approved. Please view the test link for your survey with all respective edits.

[View Link >](#)

#### Compare Survey to Another Language

If you have additional languages to translate please move to the next section to select a comparison language and translate. The Base Language for comparison will be shown on the left hand side – please translate according to this approved version of the survey.

[Compare Language >](#)

Base Survey Language	Select a Language to Compare
English (United States)	English (United States)
Expand all   Collapse all	<input type="checkbox"/> DEFAULT TERM <input checked="" type="checkbox"/> SELECTED TERM
<b>Intro Text</b>	<b>Intro Text</b>
<b>Direction</b>	<b>Direction</b>
<b>Outcome</b>	<b>Outcome</b>
1. The company has a vision for the future that is both easy to understand and meaningful to employees	1. <b>The company</b> has a vision for the future that is both easy to understand and meaningful to <b>employees</b>
2. The company's strategy is aligned with its vision	2. <b>The company</b> 's strategy is aligned with its vision
3. Employees' day-to-day behaviors are guided by the company's vision and strategy	3. <b>Employees</b> ' day-to-day behaviors are guided by <b>company</b> 's vision and strategy
<b>Practice</b>	<b>Practice</b>
1. The company's vision is clearly communicated throughout the organization	1. <b>The company</b> 's vision is clearly communicated throughout the organization
2. The company translates its vision into specific strategic	2. <b>The company</b> translates its vision into specific strategic

# Helpful resources

- Survey logistics
- **Survey design**
  - Using the text edit tool
  - **Demographics**
  - Additional survey modules
- Communications
- Testing & launch
- Deployment (kiosks)

# Self-Reported Demographics: Examples of Frequent Categories

*If employees are going to self-report demographics in the survey, it is important to create demographic questions that are a) easy for them to answer and b) get at the important segmentations of the organization*

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## 1 Tenure (standard)

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Less than 1 year

1 to <3 years

3 to <6 years

6 to <11 years

11 to <20 years

20+ years

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## 2 Geographical Region/Location (org-specific)

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## 3 Job Level (example of frequently used categories)

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Executive Team, Top Management, Middle Management, Front-Line Management, Non-Management individual contributors, Frontline worker

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## 4 Job Function (example of frequently used categories)

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Business Development/mergers and acquisitions; communications; compliance/assurance; customer service; finance; general management not otherwise classified; human resources; IT; Legal; Maintenance; Operations; operations support functions; performance management; protective services; research and development; risk ; safety; sales and marketing; shared services/support staff; strategy/strategic planning; supply chain/purchasing/procurement; other not listed

# Helpful resources

- Survey logistics
- **Survey design**
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  - Demographics
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# Additional modules to the OHI

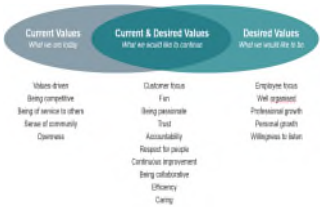
## Survey components that can be included:

### Engagement: 10 questions



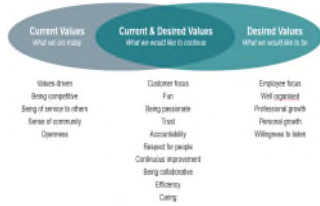
Allows for **engagement** to be held under the microscope, through the lens of organizational health. No benchmarking available

### Values survey: selection questions out of 44 values



Evaluates specific values describing your **organization's culture** based on Social Commitment, Organizational Effectiveness, Collaborative Workplace, Individual Professional Fulfillment, and Value Detractors. No benchmarking.

### Public Sector module: additional practices for mission-driven or publicly-controlled organizations



Evaluates specific values describing your **organization's culture** based on Social Commitment, Organizational Effectiveness, Collaborative Workplace, Individual Professional Fulfillment, and Value Detractors. No benchmarking.

### Open-ended questions

Editable. We read the responses to better understand employee's perception and use **some quotes to sharpen the narrative around the survey data analysis**. We are also able to produce Word Clouds and share the file with the responses (with only one demographic to guarantee confidentiality).

# Additional modules to the OHI: Engagement

## What?

- The 10 question engagement module focuses on the individual through the use of first person (“I”) questions
- Each question is rated on a 5-point agreement scale ranging from “Strongly Disagree” to “Strongly Agree”
- Particular questions are written in reverse scale to enhance the focus of respondents on specific questions

## Why?

- While the OHI encompasses some facets of engagement, this module allows for engagement to be held under the microscope, through the lens of organizational health

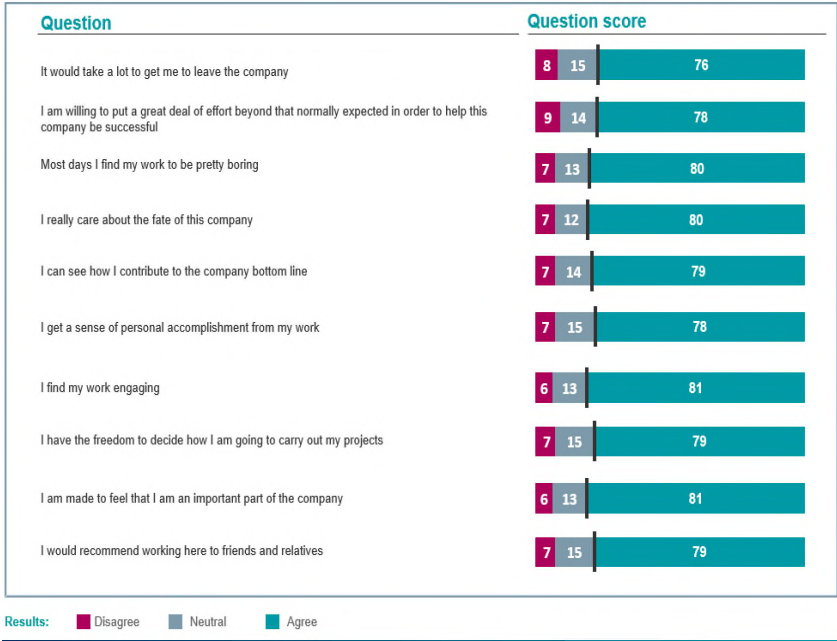
## How?

- The organization can identify specific areas engagement and provide front and mid-line manager with engagement reports to understand how their behavior is impacting direct reports
- The Engagement Module enables leaders to effectively continue tracking employee engagement metrics during an organization’s transition into the organizational health journey

## When to use

- Transitioning from an employee engagement survey to the OHI

## What it looks like



## Considerations

- No additional set-up time
- Adds 2-3 minutes to survey length
- Results delivered along with the OHI report

# Additional modules to the OHI: Values

## What?

A short diagnostic to understand current and desired values in the organization, as well as to differentiate between value enhancers and detractors

## Why?

- Organizations use this module to better inform the state of their values. It can also be used to further inform the employee value proposition
- All value detractors are found to have a strong negative impact on the overall organizational health
- Trust, Values-Driven, and Customer Focus are the top three values with the strongest positive impact on the overall organizational health

## How?

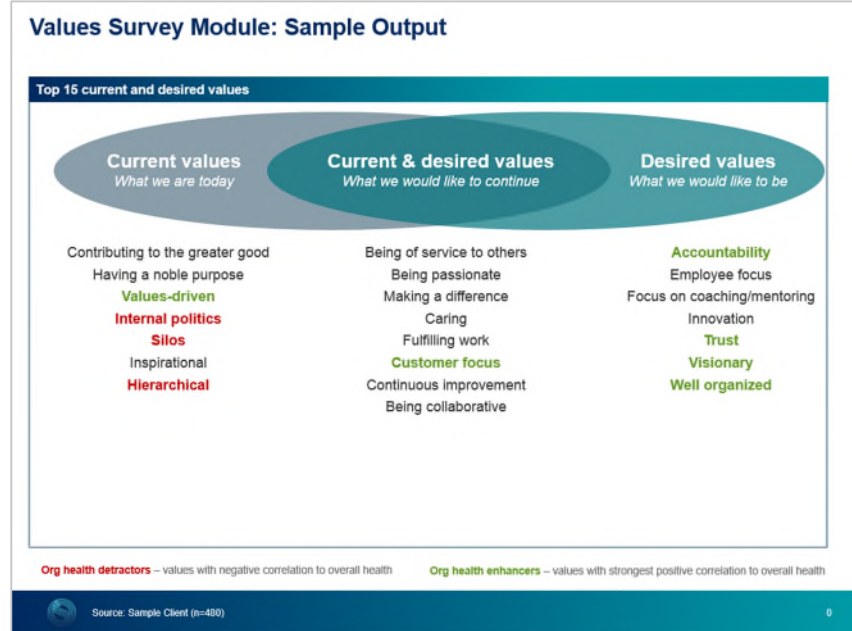
The organization improves health via the Values module by focusing on

- Diminishing the values that have negative impact on organizational health
- Promoting values that have the strongest positive impact and are selected as most desired

## When to use

- Leadership emphasis on Values
- Transformation and change
- Organizational effectiveness
- Merger
- Employee value proposition reframe

## What it looks like



## Considerations

- No additional set-up time
- Adds 2-3 minutes to survey length
- Results delivered along with the OHI report



# Additional modules to the OHI: Public & Social Sector Module



## What is the Public & Social Sector Module?

- While core management practices apply to all organizations, public & social sector entities face complex and unique challenges requiring specialized solutions
- These additional sector-specific practices are tailored to the behaviors and actions most linked to performance in non-commercial entities
- Complementing the core OHI with these practices can allow public & social sector entities to identify the right path to their own health aspirations

## Examples of additional practices tested in the module

### Direction

1. Clear Mission

### Motivation

2. Compelling Mission
3. Intrinsic Motivation

### Coordination & Control

4. Efficiency
5. Evaluation
6. Budgeting

### Accountability

7. Decision Making

### Capabilities

8. Sustainable Funding
9. Subject-matter Expertise

### Work Environment

10. Multiple Viewpoints
11. Organizational Connectivity

### When to use

- Government entities – federal, state, local, etc.
- Social sector, NGOs, education, mission-driven orgs
- Other public or quasi-public institutions

### Considerations

- No additional set-up time
- Adds 2-3 minutes to survey length
- Results delivered along with the OHI report

# Helpful resources

- Survey logistics
- Survey design
- **Communications**
- Testing & launch
- Deployment (kiosks)

# Survey participation is key to getting quality results

ILLUSTRATIVE

## To improve participation:

### Before Survey Launch

- CEO sends pre-note to the organization about the survey, when it's coming, and why it is essential to participate
- CEO and senior leaders employ strategies to build excitement about the diagnostic effort – i.e. through town halls, videos, etc.

### During Survey (Reminders)

- Frequent reminders should be compelling and consistent, using multiple media sources (i.e. emails, posters, videos, internal social media/intranet, word-of-mouth)
- Cascade communication about participation, emphasizing the importance of everyone taking the survey
- Access the online response rate portal to monitor completion rate and target extra outreach

### After Survey

- CEO sends “thank you” note (to be crafted post survey)
- Results are shared with senior leaders to begin the discussion about organizational health, and eventually played back to the entire organization

# Sample Survey Communications Timeline

ILLUSTRATIVE

Template emails    Personalized outreach    Milestones

M	T	W	Th	F
			Pre-launch announcement email	
Survey launch  Survey launch system email	Leader “walk the halls” reminders	Optional participation campaign	System reminder email or CEO reminder email	
BU leaders send reminder emails	CEO “check-in” reminders	System reminder email	System reminder email	Final system reminder email
		Optional participation campaign		Survey close (EOD)

- All employees will receive the Organizational Health Index (OHI) survey
- Survey will be open for ~2 weeks
- Multiple communication channels can be used to promote participation

## Optional activities to increase response rates



Create **OHI kiosks** – spaces with dedicated laptops and OHI ambassador(s) to assist if needed. Groups that leverage kiosk functionality typically see response rates of over 90%



Organize **townhalls/coffee breaks/pizza lunch** in various locations where leaders deliver presentations and Q&A sessions about OHI



Publish notes/memos on the company **Intranet** to remind employees to take the OHI and share response rates



Post **physical reminders (posters, pages)** in break rooms, cafeterias, and on info boards



Utilize **CEO and Senior Leaders** to send inspirational email reminders, set a competitive tone, discuss the OHI with their teams, communicate the importance of the OHI, etc.



Ask team leads to **block time on their staff meeting agenda** – make it OHI day, and devote 15-20 min to OHI survey on the staff meeting agenda

# Before the survey: CEO/sponsor pre-note (example)

**Subject:** Organizational Health Index Survey

Dear Team,

As you may already know, as an organization, **XXXX** is starting to think about how we proactively manage our organizational health on a long-term basis. To this end, we have engaged McKinsey & Company to assist us with understanding the key leadership and cultural elements that we need to build a distinctively high performing organization.

As the initial step in our health journey, we will be running an organization-wide health survey called the 'Organizational Health Index' (OHI). You will receive an e-mail with a link to an online survey. We recognize the challenge of finding time to provide your feedback, but we believe strongly that this is a vital investment for all of us; please take 20-30 minutes as early as possible to complete the survey. All responses will be treated with absolute confidentiality: the responses are compiled into a database and analyzed by groups of at least 10 people, never by individual responses.

Your participation is key. The survey is designed to be an in-depth evaluation of the way we organize and complete our work and the findings will be used as a basis to identify changes we should consider in order to ensure we achieve our performance objectives. It will take time to turn these findings into action, but in the months ahead you will begin to hear about many of the initiatives we will undertake together to ensure our organization is in top form and ready to deliver on our new strategic plan.

Thank you again for your help with this important contribution to our organization.

Please address any questions to XXXXX

Kindest regards,

**CEO**

# Survey launch: Invitation

**Subject:** Welcome to the Organizational Health Index (OHI) Survey!

Dear Team,

I (or CEO name) wrote to you all to let you know about an upcoming survey we would like you to take part in. As a part of our efforts to proactively manage our organization's health, I'd like to ask you to share your perspective through an Organization Health Index Survey by [XXXXXXX](#).

This survey will help us tremendously to understand our strengths, to highlight areas of improvement, and to design a road map for the future. It is most effective when the entire organization participates.

May I ask that you make this survey a high priority? Please find below the link to the Organizational Health Index (OHI) survey.

**Link:** [XXXXXXXXX](#)

The survey takes 20-30 minutes to complete and all responses will be treated as **confidential**. Your answers are saved every time you move forward through the survey and can be accessed at any time using your personal link. Since this link has been generated just for you, **please do not forward or share with anyone. This link is not known to any other person to protect your confidentiality.**

If you have any questions about the survey or encounter any technical difficulties, please contact XXXXXX

Thank you in advance for your participation!

Warmest regards,

**CEO**



# During survey: Reminder

**Subject:** Welcome to the Organizational Health Index (OHI) Survey!

Dear Colleague,

This is a reminder to fill out the Organizational Health Index (OHI) survey. Please note that the deadline for completion of the survey is **XXXXXXX**. If you have already filled out the survey, we sincerely thank you for your time and you can disregard this communication.

Please find below the link to the survey.

**Link: XXXXXXXX**

The survey takes 20-30 minutes to complete and all responses will be treated as **confidential**. Your answers are saved every time you move forward through the survey and can be accessed at any time using your personal link. Since this link has been generated just for you, **please do not forward or share with anyone. This link is not known to any other person to protect your confidentiality.**

If you have any questions about the survey or encounter any technical difficulties, please contact XXXXXX

Thank you in advance for your participation!

Warmest regards,

**CEO**

# After survey: Participation 'thank you' note

**Subject:** Thank you for strong participation in the OHI survey

Dear Colleagues,

I would like to express my deep appreciation for your contribution to Organizational Health Index survey. I am very proud to announce more than **XXX (XX%)** members shared with us your views over the last three weeks.

Your input will allow us to accelerate our continuous improvement and strengthen our distinctiveness together.

Thank you!

Best Regards,



# Helpful resources

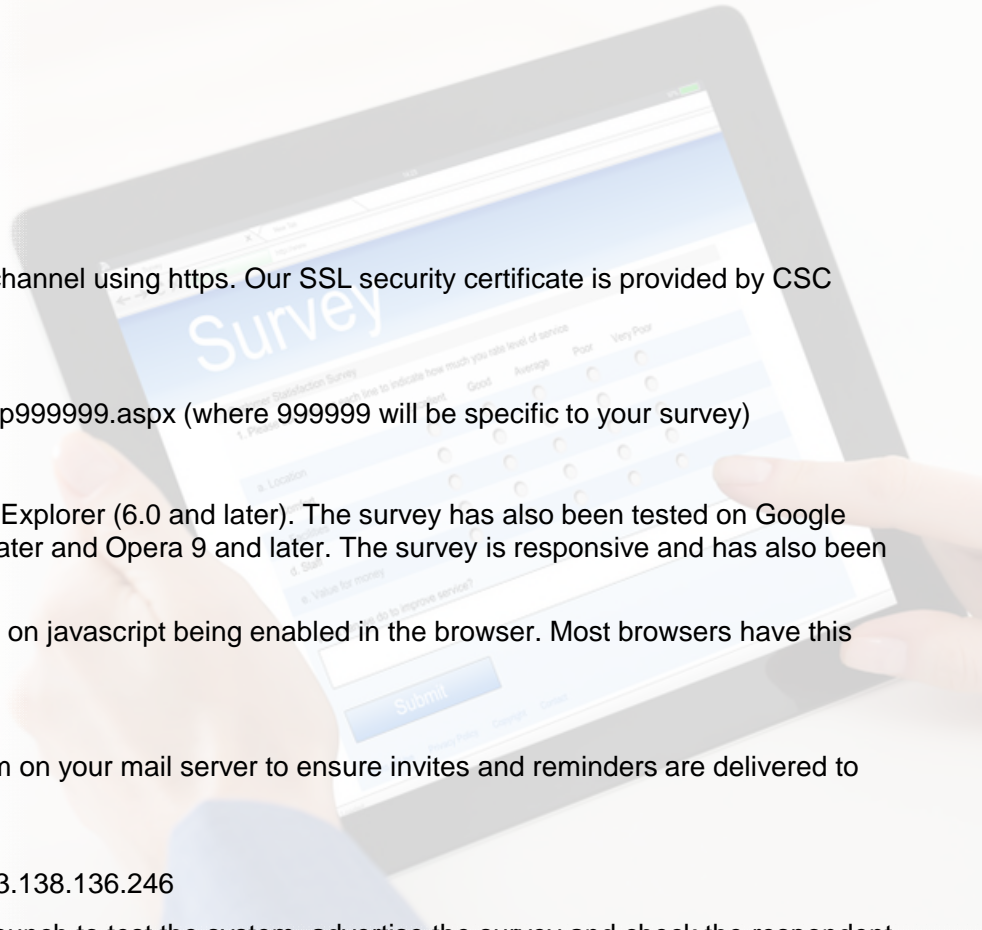
- Survey logistics
- Survey design
- Communications
- **Testing & launch**
- Deployment (kiosks)

# OHI Online Survey Requirements

## Connecting to the OHI Online Survey

In order to connect to the survey users must have access to the following...

- Domain: ohi-survey.com
- IP Address: 78.136.40.153
- Ports: 80 for http, 443 for https
- Please ensure the domain is whitelisted for all of your users.
- SSL Security
- Our preferred method of connection is over a secure encrypted channel using https. Our SSL security certificate is provided by CSC TrustedSecure Certificate Authority (CA).
- Survey URL
- The survey URL would be in the form <https://ohi-survey.com/wix/p999999.aspx> (where 999999 will be specific to your survey)
- Minimum Browser Requirements
- The OHI online survey has been optimised for Microsoft Internet Explorer (6.0 and later). The survey has also been tested on Google Chrome 11 and later, Mozilla Firefox 2.0 and later, Safari 3 and later and Opera 9 and later. The survey is responsive and has also been tested on iOS and Android.
- Javascript must be enabled. Making questions compulsory relies on javascript being enabled in the browser. Most browsers have this enabled by default.
- Email invites and reminders
- Please ensure you have whitelisted the domain @ohi-survey.com on your mail server to ensure invites and reminders are delivered to respondents and are not treated as SPAM.
  - Domain: ohi-survey.com
  - Mailer gateway: ukmail1.esurveydesigns.com IP Address: 83.138.136.246
- We recommend sending a test email to all respondents prior to launch to test the system, advertise the survey and check the respondent email list. The email would have a subject like "COMING SOON..." and would allow us to collect bouncebacks and have them corrected.
- If you are sending your own invites and reminders internally, please limit the number of invites to a maximum of 3000 per hour



# OHI Online Survey Testing

Please complete the following steps to ensure you are able to connect to our servers, take and submit a survey.

Step	Action	Expected behavior
1	Click the following link (holding down the Ctrl button) or copy and paste it to your browser: <a href="http://ohi-survey.com/wix/p49843736.aspx">http://ohi-survey.com/wix/p49843736.aspx</a>	The survey login page should appear
2	Read the message and click the >> button	The survey introduction page should appear
3	Click the >> button	You should be taken to the Demographics section
4	Click the >> button (without making any selections)	You should remain on the demographics section and a message should appear telling you to review your answers
5	Select an option in the Years of Service question and click the >> button	You should receive the error Please review your responses on this page. One or more questions require further input.
6	If you answered the Years of Service question without testing the other questions, please answer them as well and click the >> button	
7	Answer all of the questions on the direction page and click the >> button	You should be taken to the leadership section
8	Click the << button	You should be taken back to the direction section where your answers should have been saved
9	Click the “Click here to resume later” link in the top right hand side of the screen. Enter your email address or copy the resume link provided. Click the >> button	
10	Close your browser	
11	Click the resume link you copied or that was emailed to you	You should be taken back to the direction page i.e. the last completed page
12	Work your way through the sections of the survey, answering questions and clicking the >> button	
13	On the last page click on the Submit Survey button	You should be taken to the Survey Complete page

## Your computer

- Operating System (e.g. Windows XP or Windows 7):
- Make of browser (e.g. Internet Explorer):
- Browser version (e.g. version 8) (Go to the Help menu and select about):

Please complete the above testing and return your comments to your survey coordinator.

# Helpful resources

- Survey logistics
- Survey design
- Communications
- Testing & launch
- **Deployment (kiosks)**